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## University of Northern Iowa Faculty Senate Meeting Minutes, September 9, 2019

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## **Minutes of the University Faculty Senate 9 September 2019**

Senators in attendance: James Mattingly, John Burnight, Barbara Cutter, Amy Petersen, Imam Alam, Megan Balong, Danielle Cowley, Francis Degnin, Gretchen Gould, Kenneth Hall, Thomas Hesse, Donna Hoffman, Charles Holcombe, Syed Kirmani, William Koch, Amanda McCandless, Qingli Meng, Mark Herrard, Tony Gabriele (alternate for Nicole Skaar), Andrew Stollenwerk, Shahram Varzavand, Leigh Zeitz.

Guests in attendance: Mark Nook, Jim Wohlpart, John Vallentine, Patrick Pease, Becky Hawbaker, Jacob Levang, Cassie Mathes, Tonya Gerbracht, Michael Hager.

James Mattingly (0:05:26): Good afternoon. In the interest of staying on time, let's go ahead and get started. I'll call for identification of the press. Are there any press here today? I don't think so. I don't see any. We do have a couple of guests that I'd like to introduce. I'd like to ask them to introduce themselves in the back.

James Mattingly (0:06:06): Cassie Mathes could you tell everyone who you are.

Cassie Mathes (0:06:08): Hello, I'm Cassie Mathes. I'm the director of University Relations. I just started in December, so I'm still meeting people. I'm still kind of a new face on campus.

James Mattingly (0:06:22): Thank you and we have Vice President of Finance, Michael Hager.

Michael Hager (0:06:25): Michael Hager. I'm the Senior Vice President for finance and operations.

James Mattingly (0:06:30): Thank you, Michael Hager. Oh, yes, and we have one more in the way back. Sorry about that.

Tonya Gerbracht (0:06:40): Hi, I'm Tonya Gerbracht, controller [inaudible] [0:06:41]

James Mattingly (0:06:48): That's right. Okay, good.

James Mattingly (0:06:58): And now we'll have courtesy announcements beginning with the President.

Jim Wohlpart (0:07:03): You might say that first because this is true for us, too.

James Mattingly (0:07:05): Yeah, that's a good point. I was going to make these announcements later, but they're germane to all of us right away. So, let me just announce that Kathy Sundstedt retired over the summer. Yes, thank you, Kathy for so many years of service for us. We're really learning how much we're going to miss her now. We've also learned that she is evidently irreplaceable. So, we are going to try a little experiment. We're going to make transcripts of the minutes directly from recordings. We have to make sure; we have to have to make sure that you are called on to speak, okay? And or that if for some reason you don't get called on and you speak then that you announce who you are, so that the recording knows at all times who's speaking so that the transcriptionist won't get confused when they're typing out the minutes. And we'll just see how this goes. Obviously, it would be best if you wait to speak until you're called on by the chair. That's how Robert's Rules proceeds anyway. For your information, I'm going to make sure that I try to ensure that everyone who wants to speak about a matter or a motion speaks once before anyone speaks twice. So, that's how we'll proceed. All right. Now on to comments by President Mark Nook.

Mark Nook (0:08:52): Thank you. First of all, welcome to the academic year. It's great to have everything going up and running. Again, I've talked to a few of you about how classes are going. And things seem to be off and running well, at least in the classrooms of the people I've had a chance to talk to. But I just want to make a couple of quick announcements more than anything else I know you've got a busy schedule with some presentation. So, I'll limit my remarks. Just want to call everybody's attention to two presentations that are coming up. One is the Constitution Day presentation. A week from today. Nicole Hannah Jones will be speaking. Nicole is a local person. She grew up in Waterloo. Was actually a part of busing back in the 70s and 80s as a young child. Didn't realize that she was part of desegregation busing at the time, but her family was very interested in having her be a part of that. She'll be speaking as part of Constitution days, again next Monday evening. The other is the Joy Cole Corning distinguished lectureship, which is coming up in October, on the 9th of October. This year speaker, as many of you have heard already is Miss Laura Bush. But she'll be in and speaking the tickets for that are free, but you have to have a ticket. And the Corning lecture always sells out. So, you want to get there when you get an opportunity. Tickets are first available to students, and then the faculty, staff, and the public. Make sure you get in and request your tickets early, so that you can be a part of that event. Both of these have really been managed a great deal by people in our political science department, Donna and your colleagues. Thanks very much for your work

on this, and Brenda Bass for bringing these together. So, just something to keep in mind. You have any questions? I'd be happy to take them. Thank you.

James Mattingly (0:10:52): And now comments from Provost Wohlpart.

Jim Wohlpart (0:10:53): Thank you, James. We don't often pause to celebrate. And we should often pause to celebrate, especially when we do good work and hard work together. I went through all of my minutes from last year's faculty senate meeting, believe it or not, and I counted up the number of emeritus faculty that we approved. You all approved 24. But I also built a list of some of the really important consultations and approvals that you had. Multiple consultations on the faculty handbook. Multiple conversations on the general education revision and approval of the outcomes, significant. Consultation on the curriculum handbook and approval of changes. Consultation on the academic freedom policy and approval of a new academic freedom policy. A task force for academic suspension. We changed our academic suspension practices. Multiple consultations on that and then implemented some changes, which has yielded some pretty fast results. All of the curriculum, college curriculum proposals. Consultations on the budget, which I think we will have, again, today. Consultations on the Higher Learning Commission reports which are going extremely, extremely well. That's a lot of really, really important university work, and so, I thank everybody who is here. For those of you who are new this year, you can tell why everybody else around the room is really tired. We do have, again, substantive work coming at us again, this year. We need to finish the Gen Ed revision, that's going to be really important that we get that done as quickly as possible. I have seen the draft of the structure that is being discussed on the agenda committee, and it's remarkable. To be quite frank, I'm really impressed with the feedback that has come forward with us and the ideas that have been generated at it. We will continue to refine the faculty handbook. We've made some pretty substantial changes to it. As we start using it, we're going to find places where we're going to need to tweak it and make changes to it. So, we will continue to work on the faculty handbook, but it won't be as major revision as we've done. Higher Learning Commission, we will finish our report or draft report by the end of the year. The whole six months ahead of time, we will have our draft report done. That's again, quite remarkable. We will start a shared governance conversation, you all will hear more about that. Faculty leaders, I'm sure we'll talk about that. This is a major initiative and I think a really important one.

And then finally, you all have heard about academic positioning, we still have some work to do before we bring that here for a consultation. And we launched that. That won't happen until later in the fall, but that also will be a really important conversation. Academic positioning is really about surfacing ideas, about how we can lay a foundation for the future thriving of the institution. Any of those ideas that relate to curriculum will go through the regular curriculum process. Academic positioning does not jump over the traditional curriculum processes, any changes to curriculum will come through this body in the end for approval. So, I just want to be clear about that. But that also is a really exciting initiative. Thank you for your work last year

and thank you for the good work we will do together again this year. We really, really are doing remarkable work and I would take the handbook and the Higher Learning Commission and the Gen Ed work as really, really substantive work we've done over the last couple of years together that is really providing a solid foundation for this institution. So thank you for that and let's have a good year.

James Mattingly (0:14:21): Thank you Provost Wohlpert. And so now comments from Chair Cutter.

Barbara Cutter (0:14:27): Thank you. And so, my comments are for senators as well as other faculty members who happen to know these rules in particular. I'm the Chair of the Faculty and it seems like not everyone on campus is entirely sure what that means, to an extent. And honestly, on a day to day basis, sometimes I think it means I serve on tons of committees and go to a lot of meetings. But really, it's about being a spokesperson for the faculty. And so, I just want to reiterate what I said in my email a couple weeks ago that please feel free to give me feedback, ask questions on anything related to your life as a faculty member. It's really important for me to hear everything that faculty members are thinking and so, I just want to reiterate that. And also, as Provost Wohlpert mentioned, there's been a lot of work that the Senate has done and will be doing in the future. And I just want to encourage all faculty who are not at this meeting to also participate in that work. And again, that's one of the reasons feedback is so important this year is because so much new is going on, we need to know, get as much input from as many faculty members as possible. And finally, a quick plug for the faculty meeting, September 30. Monday, September 30, Lange auditorium 330 with a reception with some food beforehand at three. And the one key issue is the vote on the expansion of voting rights to some non-tenure track faculty. And so, we need a quorum of 15% of the faculty for the vote to even matter. So, it's important that people show up and it's also important that we know that as many faculty members, as possible, think about this issue. And I'll be sending an email out within the next week on the details of the exact final proposal because you've seen preliminary versions of it. That's all I have.

James Mattingly (0:16:50): Thank you Chair Cutter.

Mark Nook (0:16:53): If I may, I'd like to comment on one thing, we made one change in Barb's position description that I think is important for this group to know.

James Mattingly (0:17:00): So, this is President Nook speaking.

Mark Nook (0:17:01): Yeah.

James Mattingly (0:17:01): Thank you.

Mark Nook (0:17:02): She now serves on the President's Cabinet as chair of the faculty, that position will be represented on the cabinet, which meets approximately once a month, and includes people on there by their positions. But I think it's important to have a faculty voice on that, that group as well. It used to be known as the Executive Management Team. Everybody on it was one not necessarily involved in management and also not necessarily executives. So, change the name to cabinet and added a faculty voice as well. So, welcome. And thanks, Barb, for doing that.

Barbara Cutter (0:17:36): Thanks.

James Mattingly (0:17:39): Faculty president, United faculty president Hawbaker, do you have any comments?

Hawbaker (0:17:43): I do. So like the provost, I'd like to start with a positive. So, I just want to share that something that I consider pretty remarkable to borrow your favorite quote. That just a few years after AAUP was considering censuring this institution for our lack of shared governance. We were invited to share our shared governance and collaboration strategies at the AAUP Summer Institute and I really want to thank the provost and associate provost for giving us some video recorded remarks that we were also able to share. And I wanted to pass on all of the compliments that we got from people from other institutions where things are so much worse than here. Including Wright State where they went on a three week strike for very basic rights that should never have been taken away at all. And so just thank you and we're in much better shape than lots of places. I also wanted to share some of the introductory information that we shared with new faculty, just in case so that you could share those with people in your departments. And now that we don't have our signs about the recertification, but we sure do have a new flyer that you can post on your door if you would like. We also tried to be careful about when should you -- You might want to consider calling the union. So, we bulleted out a couple of things to think about and how to get in touch with us. I just want to give a quick update on a couple of ongoing concerns that we're working on really hard right now. And one is with our budget crunch and lack of resources that we're dealing with one thing that one way that this is hitting a number of faculty across campus is that course releases and stipends that we're expecting to receive this year for coordination duties for work that they had already undertaken over the summer, were cut back the day before classes started. And so, United Faculty's position is that the work that has been done should be compensated and that promises that were made to be honored. But that if a stipend or course release is cut then the

responsibilities and next dictation should also be cut. In terms of the rollout of the evaluation system, we're fielding some calls from people whose departments have not typically done any kind of meeting with the department head and faculty in the past. And so faculty are caught a little off guard by the one on one developmental formative meeting with the department head. And so just help us to get that word out that that is about all of us attempting to get better, and that we encourage our faculty to also use that opportunity to communicate ways that the department head could support your professional development in ways that may cost money or maybe just other forms of support and resources. And that is all.

James Mattingly (0:20:45): Thank you, United Faculty president Hawbaker. I guess one last announcement I'd like to make is that you notice that there are quite a few new faces. We have quite a few new senators this year. And I would just like to take a moment to thank you for being willing to serve in this role. It's not easy. There's a lot of preparation to do twice a month, at least. And so, thank you very much for your willingness to serve and welcome to the Senate. Okay, the first item of business then is to approve the minutes from our last meeting from April 22<sup>nd</sup>. I sent those out to all the senators last week, I would entertain a motion to approve them. Thank you, Senator Burnight. Is there a second? And thank you, Senator Gould for the second. Is there any discussion about the minutes whatsoever? Any changes to be made? If not, then I'll ask for a vote to approve them. All in favor of approving the minutes say, aye.

All (0:22:01): Aye.

James Mattingly (0:22:03): Opposed, same sign, abstaining.

Francis Degnin (0:22:08): Those of us who weren't here.

James Mattingly: (0:22:09): Those of you who weren't here. Senators Meng, Degnin, Balong, Cowley, Hoffman, and Holcombe are all abstaining. Those are our new members, by the way. Welcome again. Okay, thank you all so that motion has passed, the minutes are approved. Onto calendaring items. So, these are the items on the calendar today to go on to the docket for hopefully next time we meet. The question really on these items is do we have enough information to consider them for discussion in the future? So, the first item on the agenda to docket is item 1455. The policy 3.06 class attendance and makeup policy. Do I hear a motion to docket that item?

Senator Leigh Zeitz (0:23:08): So moved.

James Mattingly (0:23:09): By Senator Zeitz. Thank you, Senator Zeitz. And a second? Senator Kirmani. Thank you. Is there any discussion required? Could you tell what was new about that item? There was one sentence highlighted at the very -- Okay, good. Good. All right. So then -- Okay, good. Then I think we're ready for a vote. No, is there any disc-did I ask if there's any discussion? Okay, so I think we're ready for a vote on this. All in favor of docketing item 1455 say, aye.

All (0:24:06): Aye.

James Mattingly (0:24:08): Oppose same sign. Any abstaining? So, the vote passes unanimously again. Item 1456, which is a consultation regarding a name change for the Department of Communication Studies. Is there a motion to docket that item?

Syed Kirmani (0:24:28): So moved.

James Mattingly (0:24:29): Senator Kirmani, thank you. Has moved. And Senator Koch has seconded. Is there any discussion needed for this? Associate Provost Pease, did you have any comments at all as to why this is coming to the Senate, and what might be expected in the consultation, just as senators prepared to discuss it?

Patrick Pease (0:25:01): It's an opportunity for the rest of the campus to be aware of a change in a department on the chance that it impacts another faculty in a way. This doesn't go through normal curricular pass because it's not a curricular change. It didn't go through UCC and didn't get that kind of oversight and opportunity for consultation. They're not changing any of the courses or the requirements is just a name change, and so, it's really an administrative change. And so, this becomes the primary body to seek any consultation that might need to happen as part of that.

James Mattingly (0:25:35): Thank you very much. Are there any other comments or questions about that item before we would vote? And hearing none, I'll ask for a vote to put it on the docket. All in favor, say, aye.

All (0:25:54): Aye.

James Mattingly (0:25:55): Oppose, same sign. Any abstaining? The motion is passed by unanimous vote again. As you can see, we received a number of emeritus requests over the summer. And what I'd like to do is bundle them all unless there any objections to do that and



vote to docket all of them at the same time as a package. So, that would be items 1457 through 1464. I would entertain a motion to docket all of those items.

Francis Degrin (0:26:33): I move.

James Mattingly (0:26:34): Moved by Senator Degrin. Is there a second?

Andrew Stollenwerk (0:26:41): Second.

James Mattingly (0:26:42): Moved by Senator Stollenwerk or seconded by Senator Stollenwerk. Thank you. Any discussion required on these? We will be reading all of their letters when we vote on these items. Now we're just voting to docket them. So any other discussion required in senator's office?

Leigh Zeitz (0:27:07): Are we going to docket them today?

James Mattingly (0:27:08): We're voting right now to docket whether today.

Senator Leigh Zeitz (0:27:11): I know. Will they be discussed today?

James Mattingly (0:27:13): I'm not sure yet about that. I'd like to vote to docket them all and then if we have time we'll vote to move them up to today out of order. If that's okay?

Senator Leigh Zeitz (0:27:23): Yeah.

James Mattingly (0:27:24): Okay, thank you Senator Zeitz. Then I guess I'll call for a vote if there's no further discussion required. All in favor of docketing these items as a package, say, aye.

All (0:27:38): Aye.

James Mattingly (0:27:40): Oppose same sign. Abstaining? Again, the motion has passed unanimously to docket items 1457 through 1464. All of our emeritus requests. The next two items 1465 and 1466 are the early program change packages from the graduate college committee and the university undergraduate committee on curriculum. And except for item one, as I mentioned to all of you in my letter. So, there again is opposition, I would like to bundle both of those items to be docketed, to be discussed next time. I would entertain a motion to do that.

John Burnight (0:28:47): Senator Burnight.

James Mattingly (0:28:48): Thank you, Senator Burnight. A second, Senator Zeitz. Is any discussion required about these items? Did anyone know understand why we needed to move item one off of this proposal and send it back to UCC? Okay, so if no discussion is needed, then we'll take a vote. All in favor of docketing both items 1465 and 1466 say, aye.

All (0:29:27): Aye.

James Mattingly (0:29:28): Any opposed? Same sign. Abstaining? The motion passes and both items are docketed. Then finally, the last two items are consultations by the vice president finances office on the budget implications are enrollment shortfall and the consultation by Cassie Mathes on the branding research. So, I would ask to both docket those items and bring them to the front of the order, if you don't mind. So, I would take a motion in that regard. Thank you, Senator Gould. And thank you for seconding Senator Hall. Then, is there any discussion required as to why we need to do that? I'll take a vote then. All in favor of doing that please say, aye.

All (0:30:34]: Aye.

James Mattingly (0:30:35): All opposed, abstaining? Fantastic. So, those are on our docket to be discussed today. So first, we will hear from Michael Hager.

Michael Hager (0:30:50): Very well, thank you for the invitation to come back again this year and talk about the budget. Let me provide a little context under budget development. For those that aren't familiar with the context before we get into the current year's budget. The budget process normally kicks off around late October to November timeframe, and really it begins in earnest then after semester break in January February timeline. The budget process really follows the management structure of the university. So, in academic affairs, it gets pushed out

to each of the vice presidents. Academic affairs it will go to the dean's department heads. And so, the theory is that anybody can go to their department head and get information about their departments budget, and then it kind of rolls up from there. Last year, a new element was overlaid in that process. One of the new Presidential Advisory Committees, there's a budget Advisory Committee. And actually, there's five members of that committee in this room right now aside from Tanya and I. And so, if you want to raise your hands real quick, so you can see who's on the Budget Advisory Committee. So, feedback was requested --

James Mattingly (0:31:51): Sorry, let's say the names.

Amy Petersen (0:31:57): I'm Amy Petersen.

John Burnight (0:31:58): John Burnight .

James Mattingly (0:31:59): Jim Mattingly

Patrick Pease(0:32:00): Patrick Pease.

Thomas Hesse (0:32:02): Tom Hesse.

Michael Hager (0:32:03): So, those are the five members of the Budget Advisory Committee. Last year was the first year and I don't want to speak for them. But there's a lot of information that kind of comes at you early on. And it's a building process to get to a certain knowledge level to understand the contextual process of the budget. We've tried to be very transparent with that process and share the information. We're continuing to build. We met already last week, one time. Patrick chairs that committee. And so the feedback from that actually helped inform some of the decision making that the president had. And ultimately the budget is decided by the president based on the recommendations of that budget Advisory Committee and the various vice presidents. So, we set the budget this year based on enrollment, which is really a driving indicator for the general fund budget. We did that based on enrollment of 10,620, with a 200 student contingency in there. And so, if we follow between 10,420 or higher, we will be in good shape and if we were lowering that, we'll have a little bit of work left to do.

And so, the general fund budget is put together that way. The other elements that make up the budget were put together, and then it was ultimately approved by the Board of Regents in August. And so, our budget always is not official until the regents approve it, which for the last

five or six years has been in August. So, I don't know what we're really doing between July one and the August board meeting of the Board. We're kind of on a wing and a prayer maybe, but fortunately, they've always approved the budget as it comes forward by them. So, with that, I'll go ahead and run through the slides real quick. Gretchen, thank you for sharing these. So the university budget is actually about a \$357 million budget. And for those of you that were here last year, you should recognize these slides. I try to use the same format, so there's some familiarity year in and year out. We've just updated the budget numbers behind the slides. But all funds in is about \$357 million depending how you look at that. The majority of that falls into what's known as a general education fund budget, which is kind of the large green side on the right hand side. And then the other elements are on the left, and so, auxiliary unit's. That's what AUX stands for there.

Auxiliary units are units that stand on their own, or more or less stand on their own. The biggest auxiliary we have is department of residence. The Department of residence is light green berets 10% of the total funds budget. It gets no tuition, they get no state appropriations. The only money they spend is the money that they take in. So, essentially room and board dollars and some other things accounts for the residents. That's what auxiliary is. You can see research and sponsored programs, athletics, we have some special appropriations. But most of the time when people are talking about the budget at the university, they're usually referencing the general education budget, which is just that dark green side, which represents about half of the total budget. So, most of my comments here will be about the General Education Fund. And so, if we can go ahead and move to the second slide that \$177 million is the General Education Fund. And I've got a series of slides here that looks at it from different perspectives. It's the same pool of money, the same hundred and \$177 million, but we just can look at it from a few different ways. So, on this slide -- Sorry --

Michael Hager (0:35:34): On this slide, here's the General Education Fund just based on revenue, and so, we can see the state appropriations, which is the money that the legislature allocates to us is about 56% of our dollars. And then tuition is the purple and the orange. Resident tuition those from Iowa students is in purple, and then the nonresident tuition, you can see there. So, over half of our funding are General Education Fund comes from the state of Iowa tax payers, and then the rest comes from essentially student tuition. So, another way to look at this is we look at the expense side of the equation. The same \$177 million, this is broken down by IPDS category, which is a defining characteristics at the US Department of Education has every university submit their budget based on these categories. In theory, you can compare one university's budget to another university's budget using these categories. Like anything that happens at the federal level, there's some deficiencies to that, but it's at least a barometer and get you close, if not one on one correlation. But you see where we break down the different categories of the university on those different areas.

Looking at expenses again, at another slide. This is an area broken down by the various divisions at the university. So, you can see the Academic Affairs Division is about two thirds of the

budget. Finance and operations which is in red, I don't like that I need to change that (laughter), represents about 11% of the budget. I didn't catch that when I looked at the draft, but you can see the various components of the General Education Fund budget and what they do they go to division wide. One question that comes up sometime is, does money move from one division to another? And so, if we look at this next slide, you can see this is a five year trend by division and you can see there's not a lot of movement from one division to another division in there. There's a little bit here and there. You'll notice the Student Affairs one shrunk from 2016 to 2017. Student Affairs is the purple line there at the top or about the fourth one down. That big change is really enrollment management getting created. So, admissions and registrar used to sit in student affairs, and then it moved over to academic affairs, so that's the big shift, if you want to call that a big shift in terms of the difference. But for the most part, there's not big swings, money's not moving from one division to another division, as we go through each budget year.

Another way to look at this exact same hundred \$177 million is how much of it is personnel and how much of it is non-personnel. So, you can see just over three quarters of our budget goes to salaries and benefits for people and then about two thirds of that is non-personnel. Now, that non personnel part is actually, some people think that's more flexible. There are elements of that non personnel that really we can't control a whole lot. We can some but not a lot. But in there, you'll find things like utilities, property insurance, those sorts of things that we can make an impact on some of those, some of them not so much. And since personnel is a large portion, we broke that down a little bit further on this next slide and you can see in that dark purple, what percent are the different categories of the personnel wise. Going back to the same slide, going forward those two, I put it in there again.

Michael Hager (0:39:13): So, this is back to that same slide that shows the different units. What we've done before, we took this slideshow to the college senate last year, is that academic affairs is such a large portion. So, if we look at that \$115 million of Academic Affairs, frequently we get questions on where does that money breakdown? And so, the next slide shows you that hundred and \$115 million and this is broken down by college then, so you can see, within the Academic Affairs budget, what percent goes to each college. Now, the red slice there, I used to have that label Provost office and Jim said that 14% does not go to his office. And so, we've listed the red stuff there includes the library, Academic Learning Center, you can kind of read those lines. Its things that are not in a college but are still within the Academic Affairs unit and that's an example that's there of some of the larger components of that 14%. But not necessarily surprised, CHAS is a large college, and so, you would expect to see it a little bit bigger than some of the other ones are.

That's the end of the slideshow. I'd be glad to answer any questions that you may have. Let me talk a little bit about budget reductions from last year to this year. Today is census day, we will have an official number released on Thursday. All three universities release them at the same time for the Board of Regents policy. That's not to say we haven't snuck a little peek at what the

number is. I think it's probably safe to say that we will be within our budget window, and so, we shouldn't have issues for the current year budget. That's always a little bit of an unrest. And we'll probably phrase that differently than how I'm saying it to the press, but I tend to be pretty candid and straightforward as the budget committee knows. And so, I think we'll be fine for this year with where we are for the budget. The reductions from last year to this year, each division vice president was asked to come up with some reductions. Each of us came to the budget advisory committee and kind of shared some of the areas that we were looking at. Many of us utilized to open positions in my area, the budget director, our longtime budget director, Bruce Rieks retired. And so, we reduced that position and added that to the controller and the treasurer position, and Tanya is doing work with that to tie the accounting and the budget together. So, it was a natural fit, she's handling that very well. That's an example of the one area that we were able to save. I think between salary and benefits, we saved over \$160,000 on that line. I don't want to speak for each vice president because I don't have them all memorized. For each vice president, we can certainly get that information that it tended to be handled differently in each division, depending on the scope of the services that were available. But we did do base budget adjustments. So we don't have -- One of the things that got us into trouble in 2010, 2011, 2012 is we had a shortfall coming. We didn't necessarily deal with it at the base budget, we kicked it down the road said we'll figure it out next year when we got there. Well, when we got there, we were in no better shape. We've changed how we do our budget planning now where if we get a base budget, and we figure if it's going to be a tight year, let's deal with it now, so that if there's surprises down the road, we don't have that hanging over us. And so, the base budget we have right now is base. There's no cliff hanging over us to deal with any budget shortfalls due to the enrollment. That's a dramatic change from how it used to be handled at the institution. I think it's for the better. It's a little more pain to get there sometimes, but it puts us in a better position moving forward that we don't have that cliff hanging over us as we move forward. With that, I'll be glad to answer any questions you may have. That's actually why I brought Tanya along too because she knows as much better than I do on some of the details.

James Mattingly (0:42:52): Does anyone have questions for vice president Hager? Senator Kirmani?

Syed Kirmani (0:42:57): Now, is this information available for reference purposes on the web or somewhere?

Michael Hager (0:43:02): The entire budget book is available to on campus users, and so, the budget book is 900, 1000 pages. The first eight or nine pages summarize this information. And so that's available online.

Syed Kirmani (0:43:15): So, this is available?

Michael Hager (0:43:16): This particular, yes. This information is in there. It's broken down a little bit in greater detail than this as well, but that's online as well. The budget book. You cannot access it off campus, but on campus you can actually.

James Mattingly: Senator Gabriele.

Tony Gabriele (0:43:37): I just wonder if you could provide a little bit of context for some of the budget information provided. I think you mentioned 38% of the budget goes to instruction. Did I get that number correct? I was wondering if you could tell us historically how that number percentage may have fluctuated or perhaps how it compares to our peer institutions?

Michael Hager (0:44:03): I don't have that information off the top of my head. That particular slide, we don't normally look at our budget this way. I just put it in it because we do report it up to the federal government that way. Now, IPDS website-- If you just Google IPEDS, I-P-E-D-S. Their data center user comes up first in the Google search. You can look at a series of years for any college or university in the country and compare them that way. We don't normally track our expenses this way necessarily. It's kind of a one and done in terms of how we report them up to the federal government, we have found that we break them out differently based on what we've heard over the years from various department heads. And so, there is a monthly report that goes out to department heads. But that information is available, I just don't have it in front of me.

James Mattingly (0:44:50): Senator Stollenwerk here, you've got a question?

Andrew Stollenwerk (0:44:52): Yeah, so the Gen Ed fund is going down every year or not -- Not down, but relative to inflation, I think it was either flat or it went down every year. And you said something about how that's we're going to deal with that shortfall by not hiring people. And I think since the day I was hired, that's what I've heard year after year. At what point do you think we're headed for an implosion?

Michael Hager: (0:45:29) Well, I think there's- and I if I misspoke, I apologize, that's one method that we've used is not hiring people it's an easy one to grab. There're been some other efficiencies that we found in the budget. And so, if we have that light- this is where maybe if we can move backwards keep going, please- yeah, let's pause here, maybe. So, that 23% the non-personnel, we have found a number of savings in our utility area, for example. Our inflation increased this year for utilities was 1.75, which is below where inflation is really tracking, we're actually projecting for next year that we're going to be there again, and inflation is tracking higher than that. So, there's some other efficiencies within the budget that we found. Areas when we have lower enrollment, we don't need as much financial aid, which is not

saying we're cutting financial aid on individual student basis but if we have fewer students, we don't need financial aid for those students. So, there's other areas within the budget, just because personnel such a large portion, that's an easy one to give an example of but there's all kinds of efficiencies that happen throughout the budget process to find that. I think we're a long ways and I want to address this straight on, I think we're a long way from imploding. I'm not even sure that's in the realm of possibility right now. When I see what other schools are doing, Becky's mentioned it on transparency, I see it on the financial side, we meet with Standard and Poor's and Moody's, our bond rating agencies, they are seeing us different than other comprehensive universities because we are dealing with these issues as they come along, we're not kicking it under the rug, we're not kicking it down the road, we're making tough decisions as we move along. So, I think we're in a far better position than a lot of schools are. That being said comprehensives are at a challenging point right now because of the economy in the country, as well as with general college enrollment. So, we have some challenges like any other school, but we're also far better than many of the schools are in terms of positioning and dealing with these issues.

James Mattingly: (0:47:34) Are there other questions?

Amy Petersen: (0:47:37) I just have a comment.

James Mattingly: (0:47:38) Senator Petersen?

Amy Petersen: (0:47:39) Thank you. These slides are on the Senate website. If Senator Kirmani, I don't know if you knew that or not, but they're available on our Senate website.

James Mattingly: (0:47:52) Thank you. Other questions? Senator Koch?

William Koch: (0:47:59) Well, it's just the budget shortfalls is more due to tuition lack of incoming tuition rather than state appropriations, is that part of the issue because of the number of students fewer students this semester?

Michael Hager: (0:48:17) Correct.

William Koch: (0:48:17) That was anticipated in terms of that?



Michael Hager: (0:48:19) Yep. There was actually two components that probably contributed to that. We did see an increase of \$4 million in appropriations for this year. And so, what we had on the other side of the equation was lower tuition because of lower student enrollment, and then there's some natural inflationary increases, salaries and benefits went up this year. So, between the increases in inflationary costs associated with the expenses, and fewer students, that offset more than offset the \$4 million increase in state appropriations.

James Mattingly: (0:48:47) Senator Degnin?

Francis Degnin: (0:48:49) Just to clarify that \$4 million is not to our base, it was a one timer to our base.

Michael Hager: (0:48:54) It was to our base.

Francis Degnin: (0:48:55) Oh, excellent. Okay.

Michael Hager: (0:48:56) Yep.

Francis Degnin: (0:48:56) That's great, that helps.

James Mattingly: (0:49:02) Other questions? Going once, going twice. Okay.

Michael Hager: (0:49:12) Thank you for the invitation.

James Mattingly: (0:49:13) One last question. Senator Kirmani?

Syed Kirmani: (0:49:15) No, I just wanted to- because you said that the comprehensive universities are suffering because of a decline in enrollment due to general economy but the research universities are not. So, you can't say it's just because of declining enrollment because of economy, research universities are doing very well. The comprehensive industries are losing. And I think I have a reason for that. I think the comprehensive industries are failing to meet the needs of the students, they are not preparing the students as sufficient numbers for various professions. And the research schools are more nimble. So, you cannot say that it is just

because of economy, that the comprehensive universities are losing students, because if it was because of that, research universities would also lose.

James Mattingly: (0:50:12) This is President Nook.

Mark Nook: (0:50:13) It's not necessarily true and the research has been done is where I'm going on this. There is a difference in the population of students headed to research institutions and those that head to comprehensives. And there's a broad band of who the students are that go to research institutions and a broad band of differences in the students that go to comprehensive, so you kind of have to look at this in pieces. But in general, the percentage of students heading to research institutions and elite privates, there's a larger percentage of them that are profession driven. They know what they are going to do. They've known from a very early age, they were going to college. And they're going for a particular reason, they know the degree they are after. When you look at comprehensives by comparison to the research institutions and the elite public's, there's a larger portion of students, the comprehensives that are going because they've been told they need an education, they need a degree, but they haven't figured out exactly what they want out of that degree or why. In other words, there's a commitment difference in terms of the students going to each of those institutions. When the economy gets hot and entry level wages start to go up, the individuals most likely to take those when they're 18 and 19 years old, are those students who are not committed to a professional future. They think they want to get a degree, they don't necessarily know why or what it is. And so, they turn and say, "\$12 an hour, that's great. I'm going to take it." And so, there is a very big difference between the impact due the economy on research institutions and on comprehensives and on community colleges. Community colleges are being impacted in a big way. And nobody's more nimble than community colleges.

And the small privates are also being impacted. It's the elite privates, and it's the big major universities that aren't seeing it. Now is some of this nimbleness? It sure could be. But all the research is showing that this is there and that is the economy. What you see over a history of time is that the, especially the public comprehensives, and the small privates, when the unemployment rate goes below about 3, 3 and a half %, their enrollments decline. When the unemployment rate goes above about 4 and a half 5%, their enrollments skyrocket, right? So, they're insensitive to unemployment, in a very narrow band, about 3, 3 and a half % up to about 4 and a half 5%. Outside of that they start to follow the unemployment rate, right. And there's a pretty good history of that. We've also got this leveling off and the number of students coming out high schools, and it's actually starting to decline. And so, there's real pressure on who's going to get those students. And there, I mean, it's a marketing war going on right now, which might be a good transition.

James Mattingly: (0:53:14) It might very well. Thank you very much. And that's exactly why we invited director Mathes to visit with us today. If you come up to the seat here, then the mic would hear you.

Cassie Mathes: (0:53:30) Do you mind if I use my own slides, is that okay? I have several, so I'm going to try to move very quickly.

James Mattingly: (0:53:37) Do we have a way to do that?

Cassie Mathes: (0:53:38) Well, just a clicker.

James Mattingly: (0:53:40) I think we just use the key word yeah?

Michael Hager: (0:53:42) But it's Bluetooth.

James Mattingly: (0:53:45) Thank you John. Be sure to speak up.

Cassie Mathes: (0:53:48) Okay. And how do I know if it's ready?

James Mattingly: (0:53:53) It's because you maybe have the most important piece. Just scroll down, scrolling down, just [inaudible] [0:54:05].

Cassie Mathes: (0:54:08) Thank you. Thank you. Good afternoon, I'd like to echo Michael's thanks for having me here today. Let me just start by saying that I really believe that if marketing and communication is doing its job appropriately, then enrollment is not anything that you should have to worry about. I know we're all a little anxious right now about the enrollment outlook or our current outlook and the way we've been downward trending over the past couple of years. And there is certainly an extremely important role for faculty to play to make sure that students do want to come here and that they do want to stay here. But in terms of how we sell the university, how we recruit students out on the road, I want to take today to assure you that the work is going on, that the right work is going on. We are making a lot of changes and doing a lot of things in University Relations, as well as admissions to try to turn this around knowing that we really do have a goal of having a more full campus closer to 13,000, 13,500. And it'll take us a couple of years to turn this around. But the work is underway. I borrowed a couple of interest slides from university council this morning and modified them

just a little bit because I gave a very similar presentation to university counsel earlier today. But I'm going to move through it much quicker because we're trying to stay on 15 minutes.

James Mattingly: (0:55:48) Or so.

Cassie Mathes: (0:55:49) Or so. Whenever I was emailing with Dr. Mattingly, he asked for both a branding update as well as just a glimpse of what we are doing with marketing right now so we're going to cover both things starting with branding. As you probably know, last summer strategic marketing services on campus was asked to perform some really intensive brand research about UNI and so in the end, they spoke to multiple constituencies and interviewed more than 3,400 people I should say, spoke with or engaged with more than 3,400 people some of this was surveying. But they spoke with all of these various groups to try to get a read on how UNI is perceived. Just a few common themes that they came back with things that are top of mind, whenever people think of UNI they think of education or they think of business and accounting, right sized, mid-sized, accessible, safe Iowa focus. And then other positives over here on the spinal graph, friendly, welcoming, affordable, dependable all things I think we sort of know that we are known for. Negative perceptions, some of the feedback they received, that we lack diversity, that we're too small, small can be positive or negative, depending on how you're using that statement, limited majors, were known as a suitcase college. Some of the things that we really need to work on is our reputation for being innovative and visionary that was not something that we ranked very, very high for in the minds of constituencies.

Syed Kirmani: (0:57:42) I'm not surprised.

Cassie Mathes: (0:57:53) Not surprised. That we are too humble and modest. And that we have the biggest gaps in where we currently are and where we aspire to be, are in the area of diversity, stem leadership and again, this idea of being innovative. I just used a few slides from strategic marketing services presentation, if you'd like the full presentation, they can make that available to you. They have given this presentation to a few groups on campus, but I'm not sure if they've given it to faculty Senate yet. So, they obviously can go much deeper into this than I can today. But it's wonderful research, it's very helpful to know where we're headed. Undergrads and alumni tend to be very positive about us. And they spoke about high school counselors across the state, many of whom are UNI alums, speaking very positively about us during this process. What I wanted to and I underlined this line here over the weekend going through this because I really wanted this to stand out to you. The issue that I think they found is they were doing a lot of this research is that you hit a certain point where people are just not familiar with UNI they don't know who we are, they don't have an opinion about us because they don't know us. And that's a marketing issue. So, that to me stood out. And then a few more comments about diversity needing to be something that we continue to work on. They wrap up their presentation by sharing with us opportunities for the future, increasing diversity,

emphasizing inclusion, understanding that that term small can be positive or negative, depending on how you use it, increasing the knowledge of the institution to external constituencies again, that's marketing and communications right there, addressing that suitcase college perception and identifying areas of UNI that could be perceived as more innovative. And that's kind of a storytelling issue, which folds right into University Relations as well. Anything I can answer in that very, very brief look, at their research. Do you have any questions that I could pass along to them? Or Dr. Mattingly, is that something that you would prefer to reach out to Mary and Christy for?

James Mattingly: (1:00:18) I think that's fine. Senator Zeitz.

Leigh Zeitz: (1:00:21) I was wondering what type of financial support do you have for divisions and departments who go out to conferences to put up a booth and to advertise their program. We do that for our ed-tech and design program, we've been doing it for over 20 years. And now we're at a point where they want me to pay my own way to go down there and do that. And it seems to me that something like that, I mean, I'm assuming that you have a rather well financed program that something like that should be part of a marketing plan, don't you think?

Cassie Mathes: (1:00:52) I think that's a great question. Our budget in University Relations is largely used for advertising or marketing. But I can see where that is clearly a marketing opportunity for you. It's my understanding that the way we're structured at UNI that funding would come through the Dean's office or through your college and be awarded to departments for those sorts of purposes. Am I on track with that?

Leigh Zeitz: (1:01:18) Are there funds that are specific because I have funding, are there funds that are specifically earmarked to be used for marketing but are going to the Dean? Or are there just funds there, and they're saying, "Please Dean, finance the marketing." So, what I'm saying is that when you talk about specific money that's marketing money and I think that's a really important thing so it'll let it flow into the proper places. Because like I said, I mean, I go down to the conference i-tech and in Des Moines and we put up a booth and get great responses and then we get a lot of feedback on that. And I spent half my time down there manning the booth. But I'm expected to pay my whole way down there, and maybe they'll pay for the booth. But I just think that a bling and things like that things that we use to do that, I mean, the kind of stuff that you're planning to do, we're offering to do that. I'm just hoping that there's some sort of financial support there that doesn't get lost in the stream.

Cassie Mathes: (1:02:21) I don't know if dedicated support or centralized support for those kinds of efforts. But I do think it would be a great conversation to have with Deans Council, how

are these sorts of things being funded? I'm not sure if you're working with your college marketing manager on those sorts of events?

Leigh Zeitz: (1:02:37) We've been talking about that.

Cassie Mathes: (1:02:38) Yeah, or if they have some thoughts on how to-

Leigh Zeitz: (1:02:41) I think they just say it's up to the department head. But they're cutting that too, I mean, this is the lowest S&S that we've ever had. So, I'm just bringing up that as something you might consider.

James Mattingly: (1:02:52) Well, at the very least now you've planted a seed.

Leigh Zeitz: (1:02:55) I'm sorry, what?

James Mattingly: (1:02:55) Now you've planted a seed.

Leigh Zeitz: (1:02:57) I hope so because I'm going down there next Monday.

James Mattingly: (1:03:01) I think next was Senator Degnin, I believe.

Francis Degnin: (1:03:04) Yeah. And this is what other people know and something's glaringly missing in my mind. And that is, part of the very nature of a comprehensive university, and UNI in particular, is that it's a broad based education, we're not just the business school, not just the teaching college. And if we're going to play to what really makes us different, then the broad based liberal arts education, and we don't just use the word liberal, because some people get upset by that but basically, broad based education really does prepare them for life and for careers, so much more than just a narrow thing. And to give you an example, you'll find this number of years ago, had an article that said, "Interesting enough, that if you're just an accounting major or just a philosophy major, the accounting major will get a job out of college faster than the philosophy major. By mid-career, the philosophy major, it's actually making more money on average than the average accounting major." So, I think in other words, I think that's one of our strengths that just is not being communicated out there. And I just wanted to kind of at least put it out on the table so.

Cassie Mathes: (1:04:08) Thank you.

James Mattingly: (1:04:10) Senator Meng.

Qingli Meng: (1:04:11) Yeah. I just want to reinforce what these Senators have just said. I just have this situation, next week, I was invited to a conference, its regional, it is called the multi-state. So, the organizers, they are all for example, Black Hawk County's Attorney's office, I had thought this would be a good opportunity to advertise. I'm a criminologist. I come from the Department of sociology, anthropology and criminology. So, I was just thinking this morning, "What should I bring to that occasion, that conference?" It was a three day conference in Dubuque. I was invited by the Dubuque's County Attorney's Office. There, I think, besides my research of things, it maybe a good opportunity to bring our materials, something I was just thinking, so thank you for bringing that it's just I think it's a good topic to explore.

James Mattingly: (1:05:21) Thank you, Senator Meng. Anyone else have a question? Senator Kirmani?

Syed Kirmani: (1:05:26) Yeah, I think that what you presented was very insightful. And I'm glad that the people who wrote the report did not mince words without being impolite. But don't interpret this as just a question of branding, that is not just a question of miscommunication, there is something which has to be improved, it's not just that you have everything and it is not being communicated so, don't take that defensive point of view. If a change is required, if an improvement is required, do it, not just for continuous improvement. And there's no harm in admitting, "Yeah, we have to improve in certain respects." So, don't think that everything is great. It is just miscommunication or incomplete communication, that that will defeat the purpose of this exercise. But otherwise, I think it was very insightful, very nice.

James Mattingly: (1:06:25) Thank you Senator. Provost Wohlpart?

Jim Wohlpart: (1:06:27) So, thank you for bringing this up I think two or three times Senator Kirmani, this is the purpose of academic positioning is for us to take a hard look at ourselves and figure out what it is we need to do to thrive into the future. It is absolutely true that Iowa and Iowa State are constantly turning through program changes. At every board of regents meeting, they're canceling a program, adding two or three programs, changing this program, doing that, we don't we don't do that here at UNI and we need to start doing that. So, it's absolutely true that it's not just storytelling, although we absolutely must tell a better story,

because we have a story to tell, it's also that we need to take a hard look at where we're going. And we will be doing that.

James Mattingly: (1:07:04) Senator Koch?

William Koch: (1:07:06) It just occurred to me for those gaps that at UNI University as STEM leadership. And so, STEM I guess would be something Iowa and Iowa State are already are already privileging. So, that we shouldn't feel bad that maybe we don't have this STEM leadership, there's the other way that we could mark out something distinctive to UNI's education mission. Which is where the liberal arts core and the whole Gen Ed thing could become much more visionary because that was another term they put in there that we lack visionary or there's something lacking and visionary element here so I go with that.

James Mattingly: (1:07:54) Any another questions? Senator Zeitz?

Leigh Zeitz: (1:07:56) The other thing is that looking at that I didn't see anything that mentioned online learning and I'm wondering is that something you're also asking about or what are you finding out about that?

Cassie Mathes: (1:08:07) Their research at this moment is done, this research project is already wrapped up. But we should continue to ask questions about all sorts of things and online learning, where we going in the future with that, graduate college work, continuing education work, will all be part of what we look at in the coming year.

Leigh Zeitz: (1:08:25) Well, I happened to meet somebody on Friday afternoon, he was an avid alumni. He is a technology coordinator of the Spirit Lake. And obviously I say, "Well, do you have a master's in instructional technology?" And he said, "Well, I do." And I said, "Well, where did you get it?" He said, "Michigan." And I said, "Why did you do that?" "It was completely online?" And I said, "Well, what about UNI?" Because like I said, he really enjoyed UNI and he said, "Oh, you have an online program? And so, what we're saying is that that's the kind of thing that needs to be advertised. It should be something that's going to every single one of our alumni, especially the ones that have been out there for two years, because it turns out that those are the ones that are really the ones that come back. Also, we find that there's a lot of those that are technology coaches out there, there's another market that you want to make sure that they're all being educated about instructional technology. So, it's a matter of identifying those rifts.



Cassie Mathes: (1:09:21) Yeah, thank you.

James Mattingly: (1:09:22) I think Director Mathes has a little more to share with us, don't you?

Cassie Mathes: (1:09:25) I do, have I have a lot more to share. No, no, this is the tip of the iceberg yeah. Last year before I arrived at UNI, the integrated marketing council, which consists of University Relations, the web team, as well as the college marketing managers and the unit marketers that work in various units across campus, they began meeting and determining that perhaps some of the issue, especially this issue of, do people know us or not? How far away from Cedar Falls are they aware of UNI? Might be kind of pointing back to some branding work we needed to do. We have a number of units on campus who have, I described it as tried to sort of fill in the gap of a parent brand, a parent brand or a master brand at UNI trying to kind of fill in the gap by creating brand identities for their own units on campus. And that process has left us with sort of a splintered identity across the state. And we're going to talk a little bit about that. Through this work of realizing that we had some brand one on one to do for UNI we were able to hire a branding partner. They are from San Francisco. The name is Michael Patrick Partners, we've been working with them for a few months now. They're responsible for things like the Etrade logo, Sonic the Hedgehog, the original, but they also work in the Higher Ed realm, the University of Portland, Santa Clara University, Stanford Alumni Association are just some of their clients. What they're providing to us is a review of the brand research so that research that Mary and Christy can come and give you the full presentation, they've reviewed that. They've performed a very thorough audit of our current marketing assets all across campus and the messaging we use to talk about ourselves. They perform their own stakeholder interviews as well, so dean and the foundation board president, some of our administration and a number of people were interviewed while they were here on campus in August. They've done a competitor brand audit. So, they looked at Iowa State University, they looked at the University of Iowa, Wartburg, the schools where students, if they apply to UNI or they indicate and interest in UNI and they end up going somewhere else, we most often lose them to those three competitors. So, that we did a brand audit for those schools as well. In the end, they are going to give us a brand architecture recommendation, which is very different than our current brand architecture, as well as a brand messaging system and that's the piece we're working on right now with them.

This is extremely thorough, I just want to underscore. I know that this university went through a rebrand about 10 years ago, and I've had questions brought to me like, "What's different this time?" And I wasn't here. But I can tell you Jess Betts in our office was I don't know if you know, Jess, but she was here back then and she remembers the history of what that process was like. And we talk often about the difference between what we did 10 years ago, and what we're doing now and it's just night and day. This is our current brand identity architecture, where you're talking about the visual identity of UNI and the logos we put out there for Iowa to see and how they associate us. As you can see, right now, we are trying to operate as a house of

brands. So, this is a system where everybody sort of has their own identity and they kind of say different things about themselves, they're trying to create their own messaging. It's not, in the opinion of the branding agency, it's not serving us as well as it might if we operated as a branded house. So, a strong master brand or parent brand, with clear sub-brands falling within that family that ladder up to the master brand. They took a look at our colors, they've done a very in depth review of all of these visual identity assets and they found equity in the colors purple and gold. So, I mean, everything was on the table, take a look at everything and tell us what's valuable and what's not? This is the existing master brand. They found equity in the name University of Northern Iowa. I've heard conversations of, "Well, should we change our name? How far Should we go with this?" They found equity in the name, but they did not find an equity in the word mark or the nameplate. They have looked thoroughly at these, they have looked through our archives to see what kind of history they could find on our colors or why does the clock on the Campanile say 8:35 is there's some significance to? They've just done a super thorough job looking at this. And what we found and what they found in their stakeholder interviews is that people felt either like they really dislike the word mark and the nameplate up to they just feel kind of ambivalent about it. Nobody was like, "You got to keep it. We love it." We did not get that feedback so.

Becky Hawbaker: (1:15:03) Cassie?

Cassie Mathes: (1:15:03) Yes.

Becky Hawbaker: (1:15:04) When you say equity what do you mean?

Cassie Mathes: (1:15:07] Value in it, like people speak fondly of it or it exists for a reason that's really important to the institution. Yeah, yes, absolutely. So, as you could see on the graph, a couple of slides ago, where we've got all of these logos going on, I had a former colleague affectionately refer to that as logo soup at a school we worked at prior to this, we had similar situation. What they are recommending, again, we will likely change the word mark and the nameplate this fall. But what we will move toward with administration's blessing and feedback from all over campus, which we're going to be sending out feedback forms, and we'll make sure to send it to this group as well, is something that will look sort of like this, where you've got the parent brand at the top as the primary identifier and then the sub-brand underneath this is a pretty common arrangement for units within a branded house. They took a look at the seal and found equity does exist in the seal design. They're considering using some elements from the seal in a new logo designed for UNI so that we can have some consistency. They also found equity in the athletics logo. And I look at this logo, and I don't see anything that is really different especially in a bad way. When you look at all universities and their athletics logo, they typically use an acronym, they've got some sort of an animal mascot so I can see where they wanted to leave this one alone, people really like the UNI panther. So, they helped us do sort of

a visual audit of various schools and how their logos look or how they are visually identified. And they categorize this for us, which is a very interesting process.

So, at first, the first look we took at were schools that use just a word mark, there's no graphic element to this other than just pretty much the name, they have a specialized font or a size. We also looked at schools that use a shield, shields are very common in higher education, especially the more Ivy League schools we looked at shields represent, history and legacy and honor. We also looked at universities that use an initial whenever I see this sort of thing, I think of like schools that have a powerhouse athletics presence, perhaps and they're trying to kind of keep that tie there. We looked at universities that use a logo, so a logo that it's not your letter, it's not a shield, that does not necessarily reflect any specific thing about your name. This is the group we are in right now we have what they would consider a logo. Their recommendation in the end is that UNI consider moving toward a shield. And right, whenever we heard this recently, we sat back and thought, "Hmm, we're taking it in. We're still taking it in." Thinking about whether this might be right or not for UNI and so this is why we really want to make sure that you have a chance to give feedback. And we're going to circulate that form so you can provide that. What are your thoughts?

James Mattingly: (1:18:48) Senator Koch?

William Koch: (1:18:48) Well, I'm just spitballing here but instead of NFL, put in UNI, just put a pen or some academic figures yeah, sure, a UPS, why not?

James Mattingly: (1:09:09) Senator Degnin.

Francis Degnin: (1:19:13) So, I guess have a question about the equity of the colors and just to check if you checked this, I could see a scenario where you have a bunch of people that really liked one color or really like the other, but also a percentage of them that hate the other color, they don't like. And so, I just wondered if you checked for that kind of thing because that would make things more difficult?

Cassie Mathes: (1:19:31) I don't know if they get that deep with their stakeholder interviews about hating one versus another. I mean, you always want to have a secondary color so...

Francis Degnin: (1:19:41) Oh, I know but you don't want to have a secondary color that half the people hates so yeah.

Male Speaker 2: (1:19:45) Francis's comment is funny, but it's serious, too. I mean, I know students who say they don't like purple, so they're not coming to UNI. So, color does matter.

Cassie Mathes: (1:19:54) Yeah, it sure does. It's hard to have a competitor school with a vivid color like red, especially red is one of those colors, if you look back through marketing research, and you look at companies that use red and they use it for a reason. Any other thoughts about-?

James Mattingly: (1:20:15) Senator Degnin.

Francis Degnin: (1:20:15) And I'm not saying we get away from that entirely, but for example, the different shades of purple, there's different shades of yellow too. And it might be that we might play with the shades a little bit depending upon if we did the research so.

Cassie Mathes: (1:20:33) We do that currently. That is a challenge in marketing that sometimes it's tough to have that perfect PMS color of purple on everything so, but it whenever you stray too far away from it, it can impact that immediate identity. So, that is certainly something I can pass along to NPP, ask them for a little more on that.

James Mattingly: (1:20:57) Senator Kirmani.

Syed Kirmani: (1:20:58) Yeah, I was thinking that writing UNI is not very impressive lot of people will just like Northern Iowa. I think that UNI is an abbreviation and a lot of people out of the state don't know that. But Northern Iowa will be a more forceful kind of thing. Out of this year, I like the Oregon State University kind thing or maybe the Berkeley College rather than the other four. But I have heard some students and also employers say that you emphasize the Northern Iowa aspect rather than the UNI aspect. Even the University of Iowa, they call themselves The University of Iowa rather than UI.

Cassie Mathes: (1:21:48) This is a detail that I've sort of held back on sharing because we're still talking about it. But they have recommended to us that we not use the acronym UNI beyond so many miles away, that people just don't know us well enough for us to feel like we own that. They're not sure that there aren't other universities that use that same acronym. But we realized that people especially in the Cedar Valley region that really know us, they love it. So,

it's tough. It may just come down to when we are marketing further away, we will probably refer to us by our full name just to avoid confusion.

James Mattingly: (1:22:33) President Hawbaker still have a question?

Becky Hawbaker: (1:22:36) So, when you're talking about the shield, are you talking about the Lux thing, a few slides back is that that's not what we're talking about?

Jim Wohlpart: (1:22:44) This is Provost Wohlpart, that is our presidential seal. That is not our everyday- so, they will design something new?

Cassie Mathes: (1:22:50) Yes. Yeah.

Jim Wohlpart: (1:22:51) Good question.

Mark Nook: (1:22:52) This is Mark, President Nook. What Cassie said is they are looking at elements that are in that, that they might use right? Is the lamp appropriate? Is the flame appropriate? The garland that's there, are there elements in it that would make a go into designing a decent shield right?

Cassie Mathes: (1:23:25) Okay. Yes?

James Mattingly: (1:23:28) Senator Zeitz?

Leigh Zeitz: (1:23:29) Just a quick question. And that is that I noticed that the most of those they're using Serif fonts. But when we take a look at things from a digital point of view, it's easier to read sans serif, when we're looking at. Take a look at the text on the right hand side and compare it to reading the first to college. And so I'm wondering are we doing any kind of discussion as to whether we're going to be using serif or sans serif?

Cassie Mathes: (1:23:52) Not yet, but I'm sure we will, because the font will most certainly change for the new word mark. Yeah, yeah.

James Mattingly: (1:24:01) Director Mathes, do you have any more slides?

Cassie Mathes: (1:24:03) I do. Do you have time for them?

James Mattingly: (1:24:06) Please, yes.

Cassie Mathes: (1:24:06) Okay. So, we will circulate this feedback form and give you an opportunity and please share it with anybody else who might like to give feedback. This presentation would be shareable as well. I'm not sure if it's posted in the same, okay, great. And I'm happy to answer questions or come speak to your departments, whatever you would like to give more people an opportunity to way in. We are going to have a branding workshop with Michael Patrick Partners in September. And this is designed to give our folks on campus who write about UNI or design for UNI or anybody who's involved in this sort of brand element creation, a chance to really understand what the new brand looks like, what it sounds like, making sure that we're all on point whenever we create things every single day about UNI identity. Our target rollout for all of this is the very end of the year. This work influences our website redesign. I don't know if you've heard yet that we are redesigning the UNI website as well. We've received feedback from many constituents that our website needs some work. I think this is another branding challenge because whenever we have a website, and we sort of splinter it off with different identities, to me, it's not so much about how you navigate through it in terms of your clicks, but it's you get to a new site and we do have a number of sites, it's not like we have one website, they are actually their own domains kind of pieced together. When you leave one and you go to another especially for these prospective students that don't know yet what they want to major in, it can be a pretty confusing experience. And so, we are working with another company in Ohio to redesign the website this coming spring. I just want to share a couple of slides with you on what we are doing regarding a marketing plan or an advertising plan for UNI for the coming year.

We are working much more closely with admissions, the office of admissions to make sure that we have some synergy between the two offices, we want to be going to the same places, we want to make sure that those areas are blanketed with an awareness of UNI before our admissions counselors get there. So, it's not a matter of them not knowing about UNI it's just a matter of them deciding if it's the right school for them. There's a combination of things we're focusing on this face to face recruitment element that admissions is responsible for, the CRM, using the CRM for direct marketing and making sure that that is up and running in the right way, the paid advertising that we will be doing this coming year as well as earned media. Earned media is a really, really important area that I'm not sure we talk enough about so I want to make sure we're focused on that in the coming year too.

Leigh Zeitz: (1:27:00] What is earned media?

Cassie Mathes: (1:27:01) Earned media? Earned media would be working with media outlets to earn your exposure. So, having stories on the news at night, having reports in the newspaper, working with all of the radio stations, all of those outlets to have a positive presence for them.

Mark Nook: (1:27:22): Op-ed pieces.

Cassie Mathes: (1:27:23) Mm-hmm. This is a graph that we received from institutional research that just takes a look at our market share across the state of Iowa over the past 10 or so years. It compares the number of high school grads year by year the number that attended UNI and then how our market share has fluctuated each year. This gives us a good sense of how we're doing across the state. I don't want to speak on behalf of admissions. But I just wanted to share with you that they have a lot of initiatives and way to improve their work when it comes to recruitment. We have some new in state and out of state scholarships that are worth noting, we just announced that last week. Out of state students outside of the state of Iowa will receive \$5,000 right off the bat as they're admitted to UNI starting in the fall of 20, that would be new incoming freshmen. We also have new buckets of in state scholarships for students who have certain ECT scores and GPA scores combined will receive new amounts of money. So, we're definitely making it more lucrative for students to choose UNI. And you can read down through the rest of this list. One thing I might point out here, have you take note of is purchasing more names. So, we do ACT name buying, that's a big way we get a lot of names in the system and the CRM so we can start talking to them recruiting to them. We purchased 30,000 more names this year from some of those bordering states, like North Missouri, for example. We have printed 120 or 130,000 this year, it's our largest print run today. So, we're definitely increasing the communication that we're putting out there to prospective students. We wanted to take a look at Iowa and the surrounding states just to see how many high school graduates are we looking at having come from the surrounding states over the next four years or so. We know that Illinois, while it shows a large drop in high school graduates, the State of Illinois has a population of 12 million people so I mean the size of the state alone. Missouri, we see more students coming from Missouri and more students coming from Minnesota, these are great areas for us to draw from. And so, I'll show you a footprint in just a minute so you can see what our admissions territory and our marketing territory is now.

James Mattingly: (1:30:11) Senator Degnin, did you have a question?

Francis Degnin: (1:30:13) I think I'll wait till the end.

James Mattingly: (1:30:17) Senator Cowley?

Danielle Cowley: (1:30:16) I did have a question related to this.

Cassie Mathes: (1:30:18) Sure.

Danielle Cowley: (1:30:19) Have there been discussions about tuition reciprocity with our neighboring states?

Mark Nook: (1:30:26) I'll answer that.

Cassie Mathes: (1:30:26) I'll defer to you.

Mark Nook: (1:30:27) Yeah. This's President Nook. Reciprocity discussions are always difficult because they're state agreements. And I've been in Minnesota and Wisconsin and there's a strong reciprocity agreement there and how that all works. One of the issues with just opening up and using a reciprocity agreement is that the students that come from out of state, if they're paying in state tuition aren't fully paying for the cost to educate them. So, these dollars need to be made up somewhere and so how do you handle that? So, if tomorrow, we said, we're going to just allow all students from Illinois, Wisconsin and Minnesota to pay in state tuition, we'd have a budget problem because they'd be paying about \$7,500 in tuition but it costs us about 14 to 15,000, to educate them. So, we would be generating a hole and we need to think about that. What we have done is tried to offer in these out of state non-resident scholarships waivers is to pull their tuition down tuition fees down from the 19,000, down to about the cost to educate. And that'll put us really close to what it would cost for them to go to school in state in Illinois, and to the research institutions in Minnesota and Wisconsin, it doesn't quite get us down to the comprehensives in those states, but it makes us much, much more competitive. But reciprocity is tricky. The other option we have is something called the Midwest Higher Education Exchange. And we are looking at how that might work. But that can be an individual institution, saying we're going to let you in for something less than the full non-resident. And it can be done not only for all students from any state, but it can be done for only particular programs or you can limit to a certain number of students. So, there's some options there that we're checking out. I'd like to not make it any messier than possible to keep it simple so everybody knows what they've got and what they'd have for tuition.

Cassie Mathes: (1:32:41) This map basically shows you our designated market areas that fall within that 200 mile radius where we will be actively advertising UNI. The reason we selected a



200 mile radius is because we know from research that most students who are attending a public college comprehensive four year school are going to travel about 150 miles or so to go to school there, beyond that, you would have to be an Ivy League or an R1 School for them to travel much further. And so, that's what we're going to concentrate our funds and our energy, these DMAs fall within that 200 mile radius. So, I can talk more about DMS at another time if you'd like. It's just a way for us to segment off different market areas and make some advertising plans specific to those areas. Oh, I do want to mention really quickly, we're partnering with JW Morton out of Cedar Rapids and Happy Medium out of Des Moines to help us with our traditional digital ad placement for the coming year. The digital one is important because this is a change in company. We used a different company for the past three years to help us with our digital placement and we've changed it this year. Those earned media efforts are just something I want to talk about for one second, we really have, I think, a lot of opportunity when it comes to our relationships with media outlets across the state and beyond and getting more in tune with those reporters and their rhythms. I would really like to see our office develop relationships with someone from every outlet we can across the state so that whenever we are pitching a story to them, we know who to call, we know what they're working on, we know if the story is going to have successful placement or not, we can sort of start to figure out ways to tailor certain stories or certain topics to certain outlets. And this kind of strategy, I think will really help us grow that earned media. We get dominated in the press, obviously by the big R1 schools every day. So, it's really just going to take a hands on effort with these outlets to get to know people there and know what will work. The CRM just to let you know we have some journeys running right now for prospects and suspects. We are building out more journeys this year, a lot more journeys. So, we're really going to use the CRM to its maximum potential. And it is a fantastic tool for direct marketing with these incoming students. So, this is a lot of work. We've got a team dedicated to building out this sort of communication and it's valuable. Finally, I just want to share with you this is that footprint I was talking about, this is what it looks like 200 miles away from the Cedar Falls Waterloo area. We reached out a little bit further to include Chicago in that footprint. But this is essentially where you're going to see UNI advertised in the coming year, probably the coming years. It's not something you want to change year by year. It takes a while to build recognize ability.

Jim Wohlpart: (1:35:44) Cassie, you have about 30 seconds, otherwise they have to vote to continue.

Cassie Mathes: (1:35:47) Oh, I'm sorry. We're going to include Kansas City, St. Louis. And here are more things we're working on. There's a lot going on in marketing and communication. And I'm happy to come back another time.

James Mattingly: (1:35:59) Thank you. Thank you. This is Cassie Mathes our new director of University Relations. So, thank you very much for agreeing to be with us.

[Clapping]

James Mattingly: (1:36:14) And we're just finished at 5:00. I will accept a motion to adjourn.

William Koch: (1:36:19) Koch.

James Mattingly: (1:36:20) Thank you, Senator Koch. Is there a second?

John Burnight: (1:36:23) Burnight.

James Mattingly: (1:36:24) And Senator Burnight thank you very much. And we are adjourned

[Audio Ends] [1:36:41]